



**Executive Office**  
P.O. Box 942701  
Sacramento, CA 94229-2701  
Telecommunications Device for the Deaf – (916) 795-3240  
(916) 795-3822, FAX (916) 795-2761

June 20, 2006

## **AGENDA ITEM 8**

**TO: MEMBERS OF THE BENEFITS AND PROGRAM ADMINISTRATION COMMITTEE**

- I. SUBJECT:** Member and Benefit Services Branch Effectiveness Measures 3<sup>rd</sup> Quarter
- II. PROGRAM:** Member and Benefit Services Branch
- III. RECOMMENDATION:** For Information Only
- IV. ANALYSIS:**

We have made significant progress in several areas with regard to reducing existing backlogs:

1. Service Credit Costing and Elections

During the prior fiscal year (2004/05), Member Services Division eliminated the backlog of Additional Retirement Service Credit (ARSC) requests resulting from new legislation that became effective January 1, 2004 (Attachment A-1). During this current year, the goal has been to eliminate all remaining backlogs for the non-ARSC service credit types (i.e., military, service prior to membership, redeposits, etc.) by June 30, 2006.

Attachment A-2 shows the dramatic reduction in the non-ARSC backlog through May 31 of this year. At the beginning of the fiscal year, the number of cases older than 90 days was in excess of 6,000. As of May 31, that number has been reduced to 102. As a result of the elimination of the service credit backlogs, we expect to meet our effectiveness measures by the end of the fourth quarter.

2. Disability Retirements

A temporary initiative to liquidate an unexpected backlog of disability retirement applications has succeeded in reducing the caseload volume on hand (Attachment B).

To consistently achieve and maintain our performance goals for disability retirement claims, a permanent plan is now in place. The plan elements include reinforced application requirements, process and system improvements, strategic resource allocation, and a dedicated training program.

3. Third Quarter Effectiveness Measures

The 3<sup>rd</sup> quarter effectiveness measures for MBSB are attached. Also attached are additional management reports which MBSB uses internally to manage workload and measure progress. As we informed the Committee at the April 2006 BPAC meeting, these reports provide additional details that measure workload volumes, productivity, and progress, and coupled with the effectiveness measure reports, provide a more complete picture of where things currently stand.

**V. STRATEGIC PLAN:**

New measurements resulting from the Performance Management Project will provide a useful tool in assessing progress towards meeting the new CalPERS strategic goals.

**VI. RESULTS/COSTS:**

None.



---

Kathie Vaughn  
Assistant Executive Officer  
Member and Benefit Services Branch

Attachments